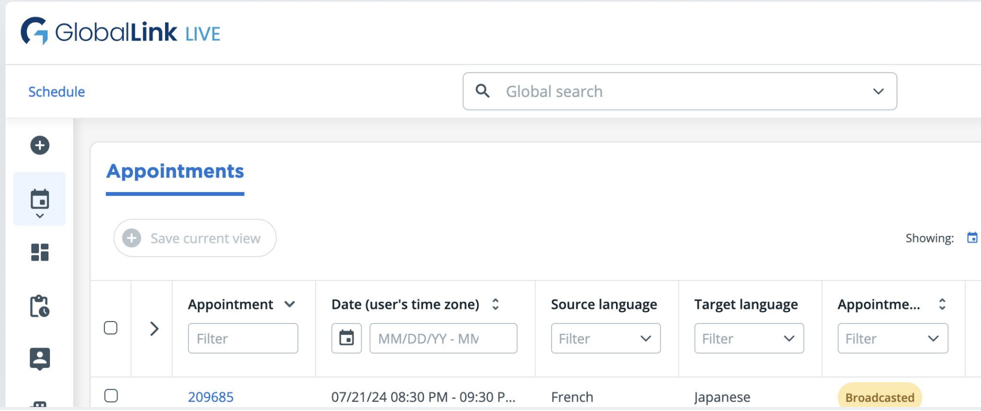
GlobalLink LIVE

Client manual



Application Overview

Brief description of the application

The platform is a web-based application where users can log in and create interpretation service requests to TransPerfect. The platform allows users to see the status of all their interpretation service requests in real-time.

Users can also perform actions such as modifying previously requested appointments, canceling them if necessary, and viewing the names of the interpreters once they have been confirmed for the requested service. This platform aims to streamline the steps for creating interpretation requests and provide maximum visibility to the user.

Purpose of the manual

This manual aims to guide users through the process of creating and managing interpretation appointments, as well as utilizing other available features of the platform.

Prerequisites

System requirements

1. **Web Browser:**
   - Google Chrome
   - Mozilla Firefox
   - Microsoft Edge
   - Safari

2. **Internet Connection:**
   - Stable broadband connection

   This ensures compatibility and optimal performance of the platform, regardless of the operating system.

Creating an Appointment

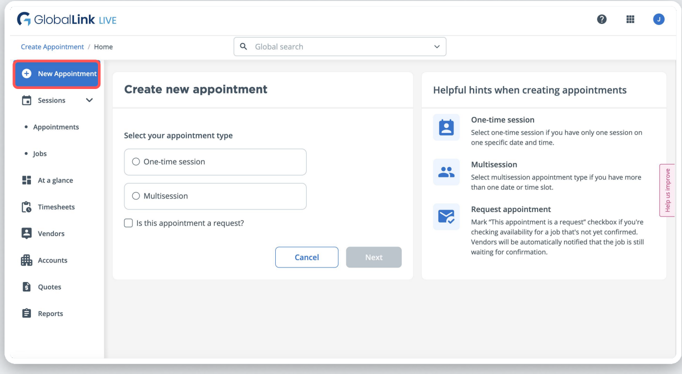
Appointment types

The platform offers flexibility in creating interpretation sessions, accommodating both one-time sessions and more complex multisession arrangements.

1 ***One-time sessions***

Single-day sessions are used when the client requires one or more interpreters for a single session with a defined start and end time.

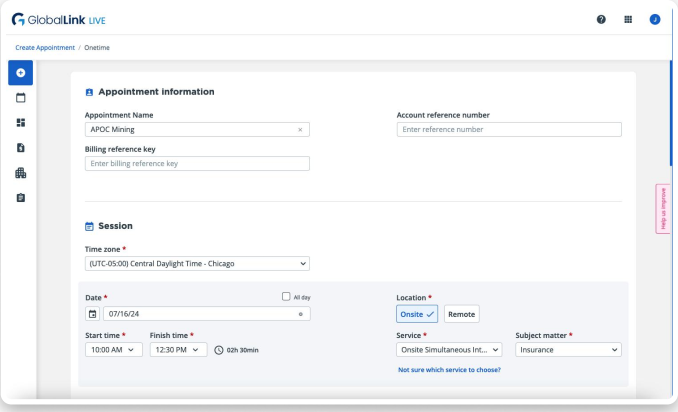
This streamlined process is ideal for appointments that occur within a single session timeframe.



2 ***Multisession appointments***

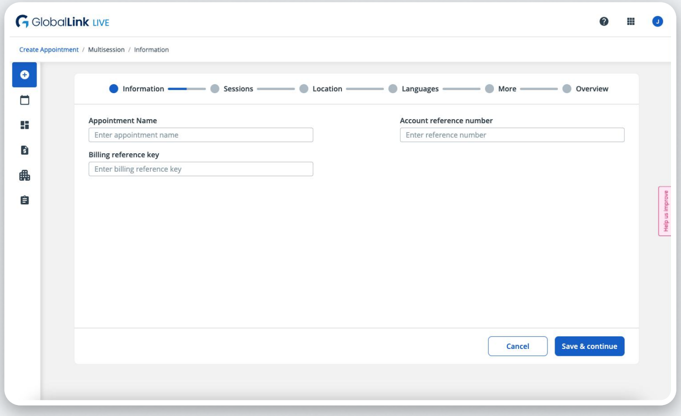
Multi-session appointments are utilized for more complex interpretation service requests where sessions span across multiple days or times. For example, conferences that require consistent interpretation services from Monday to Friday, 9:00 AM to 5:00 PM, for five consecutive days would be categorized as a multi-session appointment.

This method guides users through a step-by-step form, structured to collect information grouped by relevant topics. Each step is designed to ensure comprehensive data entry and coordination for extended or recurring interpretation services.



3 *Step-by-step guide to creating a new appointment*

Creating an interpretation appointment involves providing detailed information across several key sections: Appointment Information, Session Details, Location, Language Pairs, and More.



Appointment Information

Enter relevant details such as:

- Appointment Name: A descriptive identifier for the appointment.
- Account Reference Number: Optional reference number provided by the user for internal tracking.
- Billing Reference Key: Optional key for billing purposes.

This information is not mandatory but provides users with the flexibility to input data that may be useful for future reference or reporting purposes.

Session Details

Date, time and timezone
Users select the start and end date and time. The application ensures appointments cannot be scheduled before the current date and time.

Users specify the timezone relevant to the session. This ensures all timing information aligns with the user's location or specific requirements.

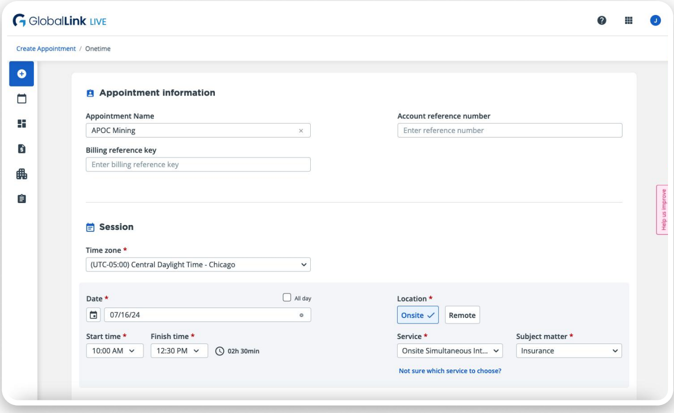
By default, the application suggests parameters for the start time. Users can adjust this in two ways:

- Choose from pre-defined time slots in the dropdown menu.
- Manually input specific hours and minutes using the keyboard for precise timing needs.

Session Type
Users specify whether the session is on-site or remote. This distinction influences the available services displayed, which are tailored to each session type.

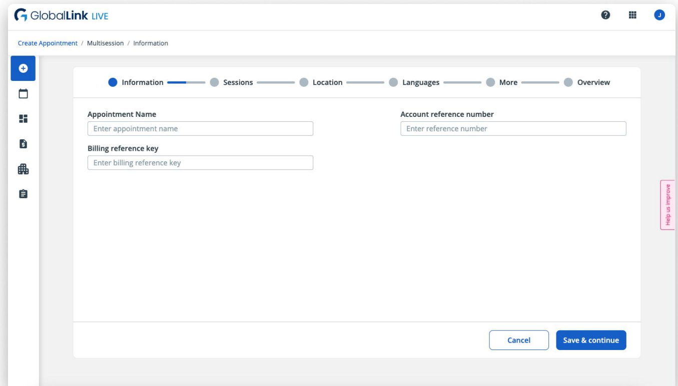
Additional contextual information explaining service descriptions is accessible via a button near the service selection area, helping users choose the appropriate service.

Subject Matter
Users choose the subject matter or specialization of the interpretation session. This detail ensures the platform matches them with interpreters who possess expertise in the relevant field, optimizing service quality.



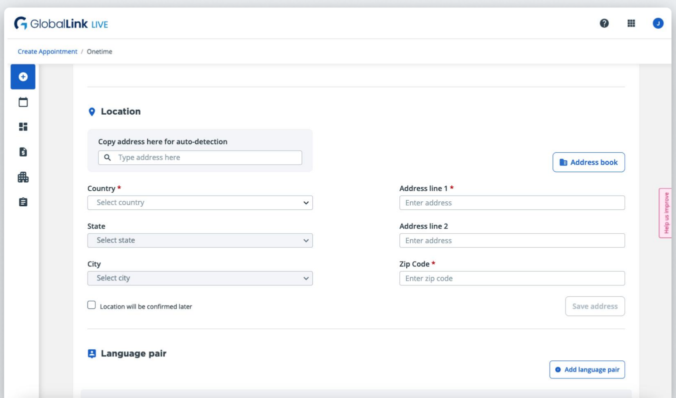
Session Details (continued)

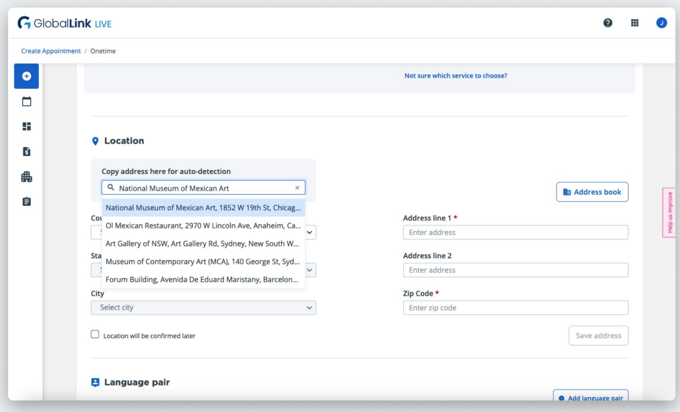
On-Site Session
When selecting an on-site session, users must specify the exact location where the interpretation session will occur.



Required fields include:

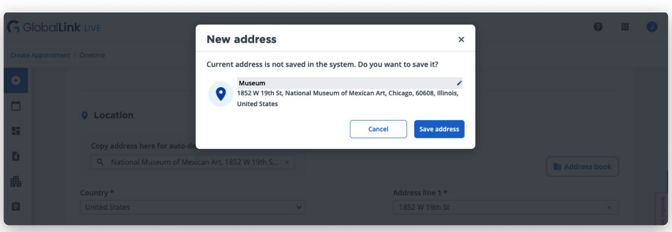
- Country
- State (if applicable)
- City
- Address
- Zip Code

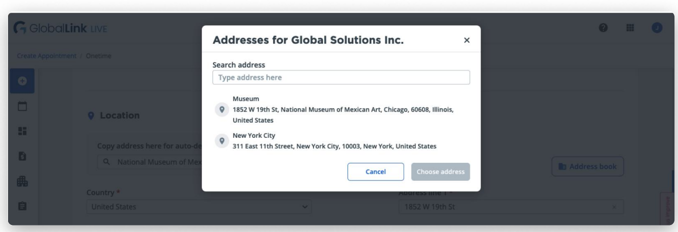




The application provides functionality to streamline address input. Users can type an address, and the system automatically suggests complete information for city, country, etc., making data entry simple and efficient.

A feature allows users to save addresses to their address book for future reference. Saved addresses can be easily accessed for subsequent appointment creations.



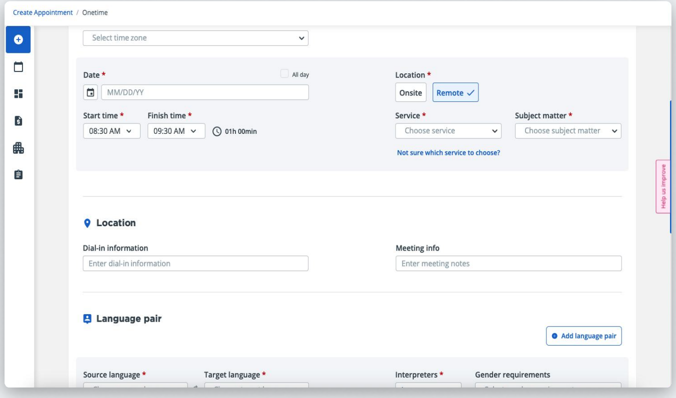


Users can save frequently used session locations to their address book for convenience. Once saved, these addresses can be quickly retrieved and selected for future appointment scheduling, streamlining the process for recurring appointments.

Session Details (continued)

Remote Session

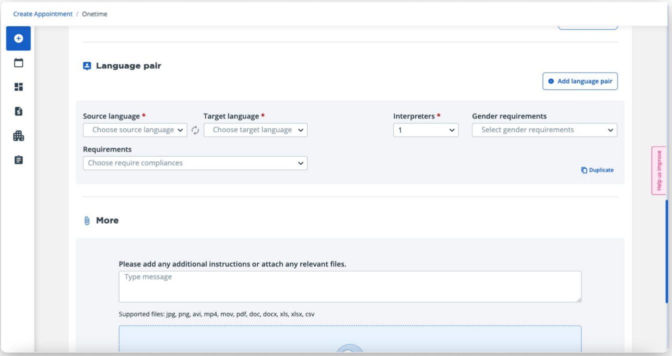
If a remote session is chosen, the Location section adapts accordingly to reflect virtual or online meeting details relevant to the session: Dial-in information and Meeting information



Language Pairs

This section outlines the functionalities available to users within the Language Pairs section, emphasizing language selection, interpreter preferences, and additional requirements to ensure precise matching and delivery of interpretation services.

All provided information assists the team in identifying and assigning the most suitable interpreters who can deliver exceptional service tailored to the client's needs.



Language Selection

Users specify the source and target languages for the interpretation service. This selection determines the languages in which communication will be interpreted during the session.

Multiple Interpreters

While typically one interpreter is selected per session, users have the flexibility to request multiple interpreters for a single Language Pair if needed. This accommodates scenarios where multiple interpreters are necessary to meet specific client requirements or manage complex sessions effectively.

Gender Preference

Users may optionally specify their preference or requirement regarding the gender of the interpreters. This allows customization based on client preferences or specific needs that may arise during the session.

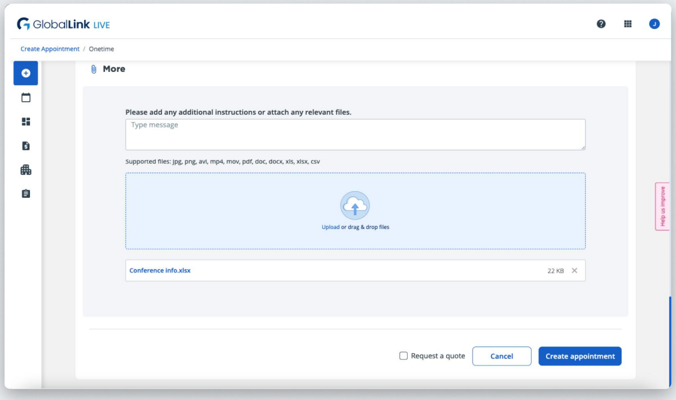
Additional Requirements

Users can specify any additional requirements or specific skills desired in the interpreters selected for the appointment. These details assist in matching users with interpreters who possess the necessary expertise and qualifications to deliver optimal service.

Session Details (continued)

More
The section allows users to provide specific notes and attach documents for project managers and interpreters to reference during the interpretation session.

The ability to include notes and attach documents ensures interpreters have comprehensive context and resources necessary to deliver high-quality interpretation services.



Adding Notes
Users can input detailed notes that highlight important information or specific instructions relevant to the session.

These notes are crucial for project managers to ensure that all client preferences and requirements are communicated effectively to the interpreters.

*Attaching Documents**
Users have the option to attach documents that may assist interpreters in preparing for and conducting the interpretation session.

Documents could include agendas, presentations, glossaries, or any other relevant materials that enhance the interpreter’s understanding and performance.

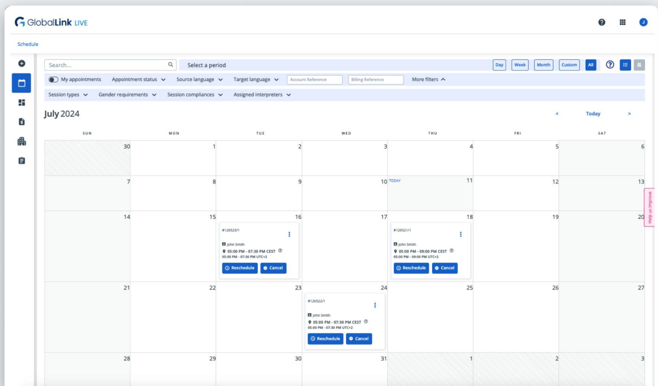
**Optional feature that may not be enabled for your organization.*

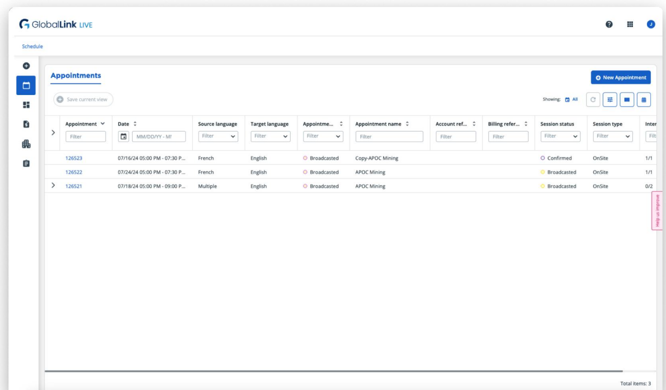
Managing Appointments

How to view existing appointments

The Appointment Management section allows users to view their appointments in two distinct formats: calendar view and table view.

Both calendar and table views offer enhanced visibility and control over appointment management, ensuring users can efficiently monitor, organize, and customize their appointment listings based on individual preferences and operational needs.





1 ***Calendar View***

Users can visualize their appointments and session details on a familiar calendar interface, akin to popular calendar applications.

Filters can be applied based on various criteria:

- Appointment status
- Source and target languages
- Account reference or billing reference
- Session type, required gender, etc.

Time filters allow users to narrow down appointments within specific time frames, although the default view typically displays appointments for the entire month.

These filters streamline navigation and visibility, especially useful when managing a large volume of appointments.

2 ***Table View***

Alternatively, appointments can be viewed in a table format, providing a structured view similar to spreadsheets like Excel.

Users benefit from the ability to add, view, and edit appointments directly within the table format.

Customization options include:

- Adjusting displayed columns
- Rearranging column order
- Applying filters dynamically
- Saving personalized views for future use, accommodating specific viewing requirements such as appointment statuses or language pairs.

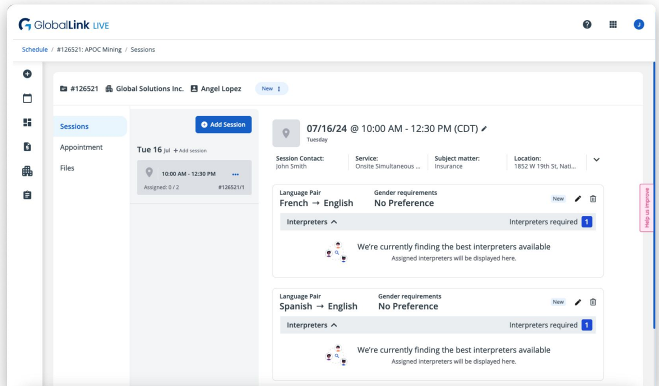
Appointment details

The Appointment Details section provides users with comprehensive information regarding each created appointment.

1 ***Sessions***

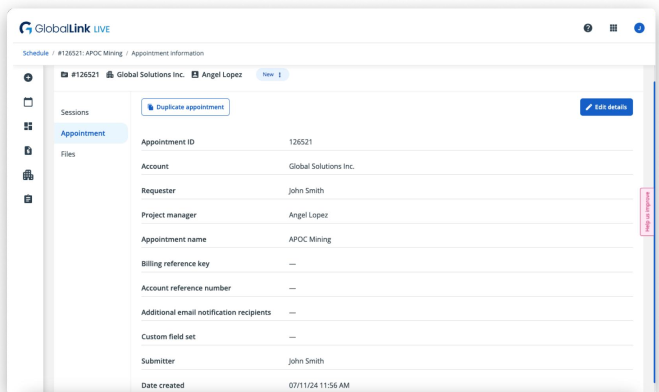
Users can view essential details such as the appointment status, start date, selected service type, location details, and language pairs associated with the appointment. This section serves as a central hub for accessing all pertinent information related to the appointment at a glance.

Within the Appointment Details view, users can delve deeper to access specific information entered during the appointment creation process.



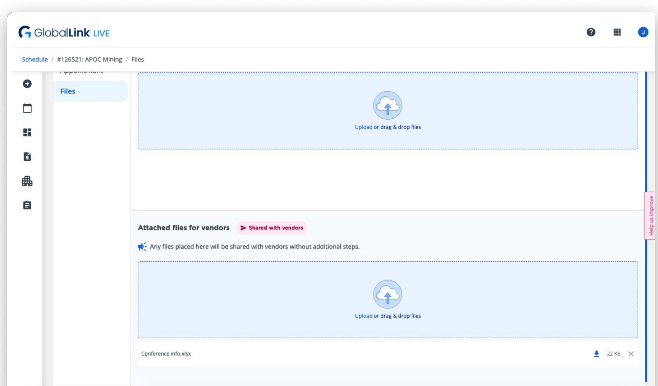
2 ***Appointment***

It may include additional details such as appointment identifiers, creator information, creation timestamps, and any relevant notes or attachments associated with the appointment.



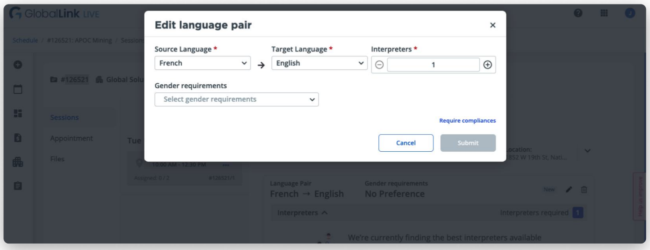
2 ***Files***

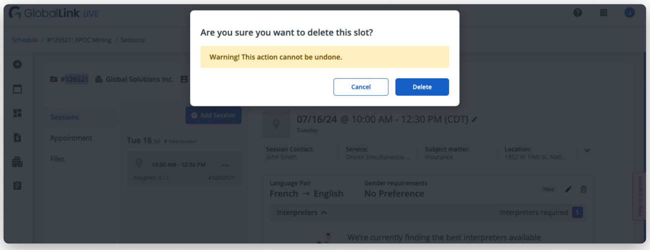
Users have the capability to view existing documents related to the appointment. Additionally, they can upload new documents directly from this section, facilitating seamless document management and ensuring interpreters have necessary resources for the session.



Modifying appointments

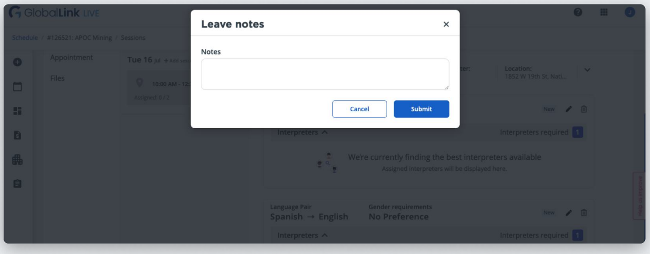
Users can perform several actions to modify appointment details directly from the appointment view.

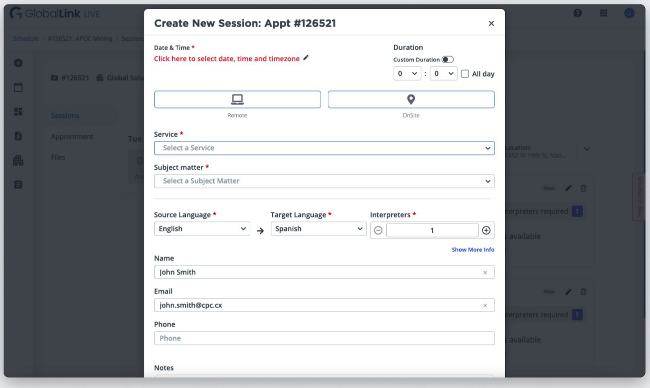




1. ***Editing Language Pairs***
Users have the ability to edit language pairs if there are any errors or changes needed. This includes modifying existing language pairs or adjusting the number of interpreters.

Additionally, users can delete language pairs if necessary or add additional language pairs to the session.





2. ***Managing Session Details***
Users can edit or add notes to the appointment session if these were not initially included during appointment creation.

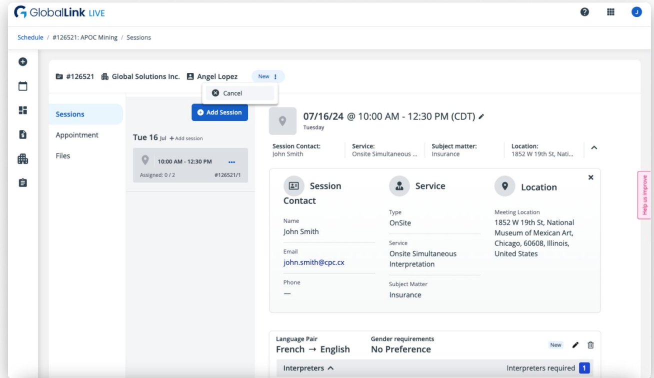
If additional sessions are required beyond the current setup, users can duplicate or create new sessions within the same appointment.

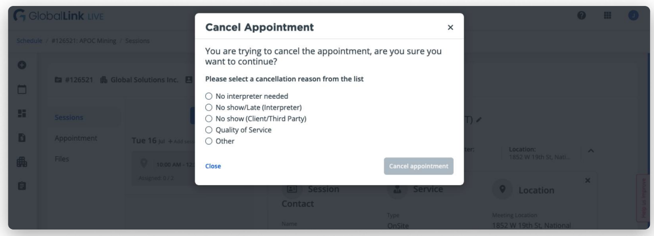
Cancelling appointment

Users can initiate the cancellation of an appointment from the top panel where the appointment status is displayed.

1. *Cancellation Process*
   - Navigate to the top panel and click on the three dots (...) adjacent to the appointment status.
   - If the option to cancel is visible, users can proceed with cancellation without incurring any costs, indicating that TransPerfect has not yet initiated interpreter assignment.
   - Select the reason for cancellation from the provided options on the screen.

2. *Contacting Project Manager*
   If cancellation is not available from the system, it suggests that TransPerfect has already begun the process of assigning interpreters. Users are advised to contact the project manager to discuss cancellation possibilities.

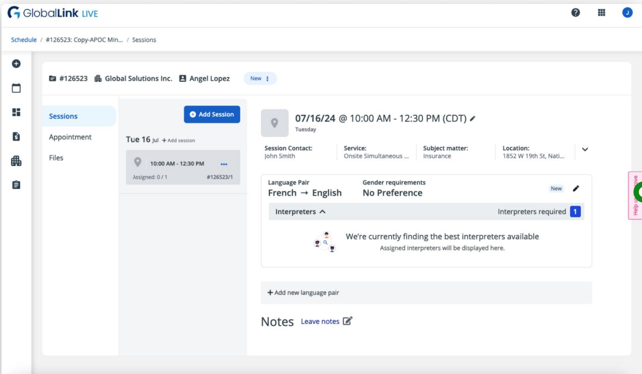


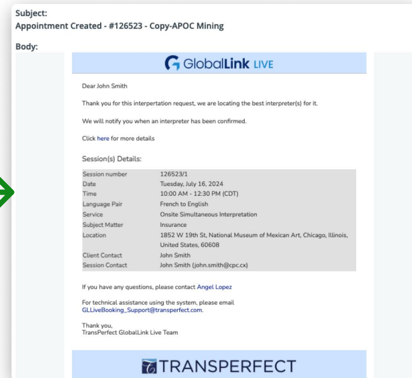


July 2024

Creation submission flow

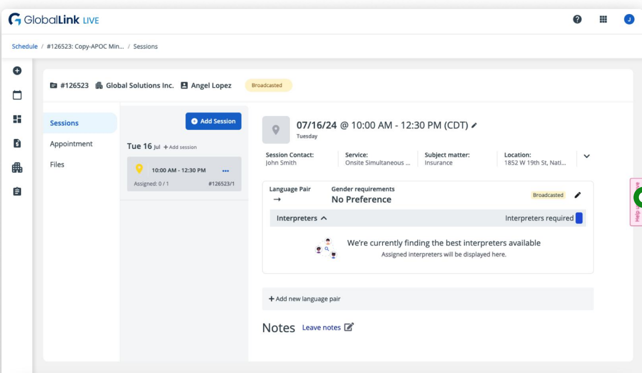
When a user submits a new interpretation service request through the platform, the following workflow ensues:

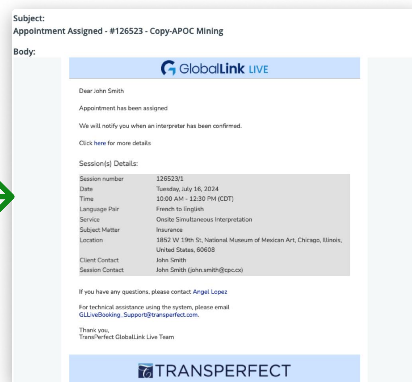




1 ***Confirmation and Details Viewing***
Upon creating a new appointment, the user is automatically redirected to the appointment details page within the platform.

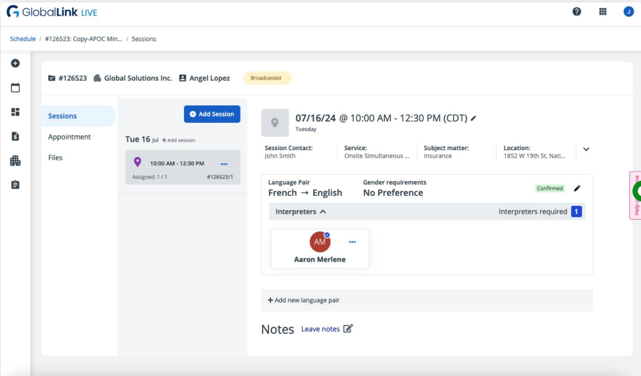
Simultaneously, the user receives a notification email containing comprehensive information about the appointment and instructions for next steps.

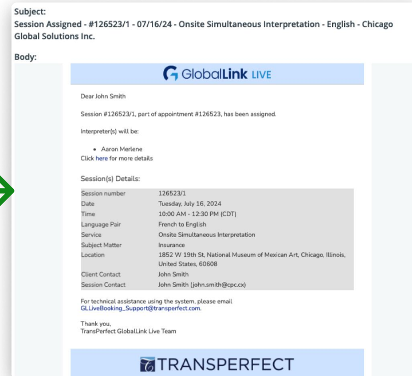




2 ***Interpreter Search Initiation***
Once the appointment is registered, TransPerfect initiates the process of finding suitable interpreters based on the client's specified requirements.

The user receives an email notification confirming that TransPerfect has commenced the search for interpreters who meet the specified criteria.




Subject:
Session Assigned - #126523/1 - 07/16/24 - Onsite Simultaneous Interpretation - English - Chicago Global Solutions Inc.

Body:

GlobalLink LIVE

Dear John Smith

Session #126523/1, part of appointment #126523, has been assigned.

Interpreter(s) will be:

- Aaron Merlene

Click here for more details

Session(s) Details:

Session number	126523/1
Date	Tuesday, July 16, 2024
Time	10:00 AM - 12:30 PM (CDT)
Language Pair	French to English
Service	Onsite Simultaneous Interpretation
Subject Matter	Insurance
Location	1852 W 19th St, National Museum of Mexican Art, Chicago, Illinois, United States, 60608
Client Contact	John Smith
Session Contact	John Smith (john.smith@cpc.cx)

For technical assistance using the system, please email GLLiveBooking_Support@transperfect.com.

Thank you,
TransPerfect GlobalLink Live Team

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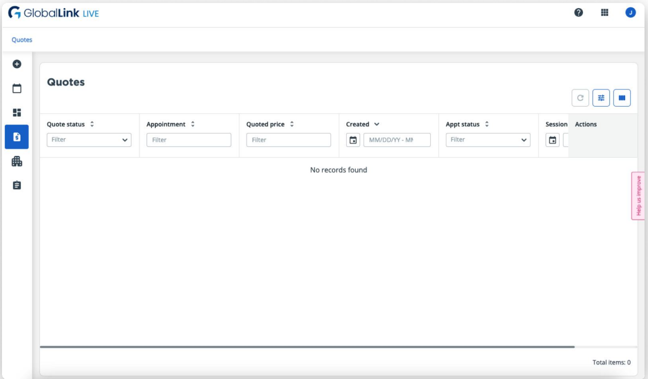
3 ***Interpreter Search Initiation***
Once the appointment is registered, TransPerfect initiates the process of finding suitable interpreters based on the client's specified requirements.

This notification includes details about the confirmed interpreter, and the user can also verify this information directly on the platform.

Quote submission flow



Users can request quotes for interpretation services through the platform, and monitor the status of these quotes in the dedicated section.

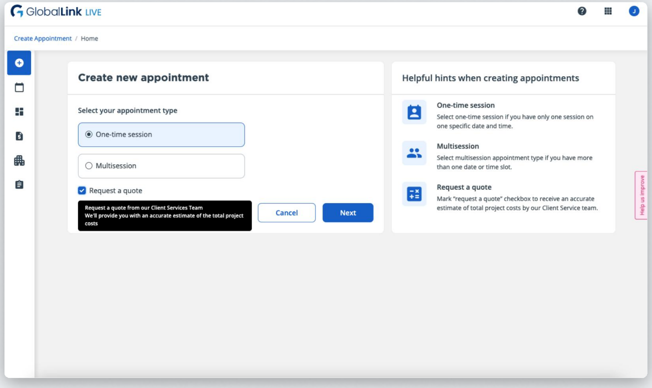
Users can access the Quotes section to view all quotes that have been submitted, approved, denied, etc. From this panel, users can take necessary actions on quotes that are still pending. Actions may include approving, rejecting, or modifying quotes based on project requirements and budget considerations.

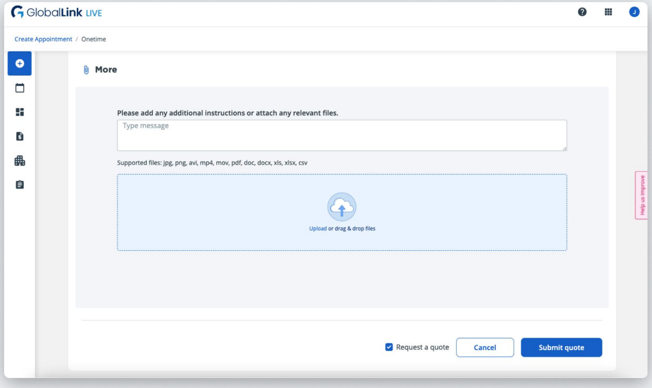
The platform provides comprehensive visibility into the status of quotes, empowering users to make informed decisions promptly.

1 ***Quote submission***

Creating a quote within the platform follows a similar process to creating a confirmed appointment, with a specific checkbox setting the quote apart:

- Start by navigating to the appointment creation section.
- Check the checkbox labeled "Request a quote"

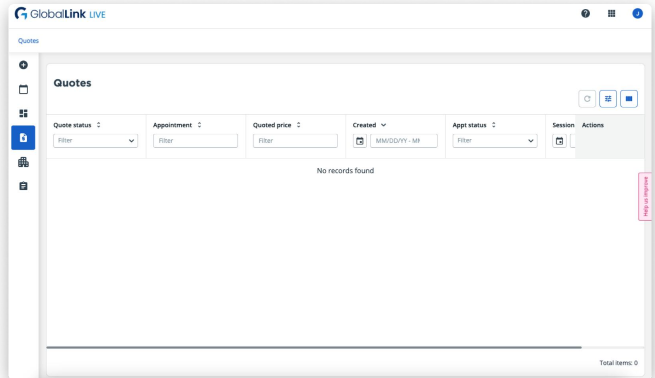




This action transforms the appointment creation button into a "Submit quote" button.

2 ***Key Differences***
A quote operates similarly to a confirmed appointment but serves as an unapproved request pending client confirmation.

Once submitted as a quote, the platform awaits client approval before proceeding to secure interpreters for the assignment.

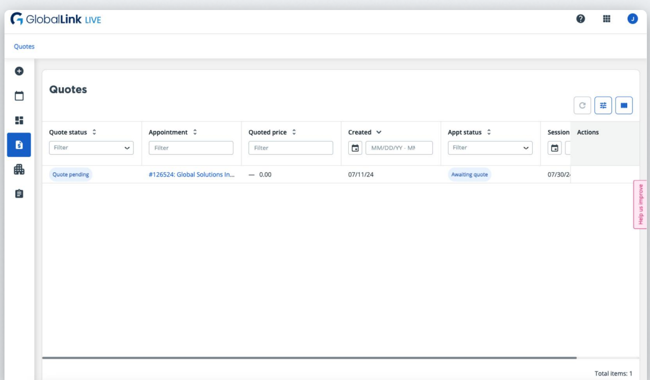


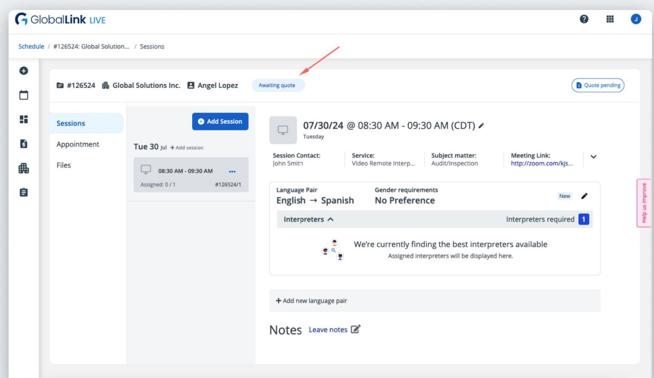
Quote created

Once a quote is created within the platform, users will encounter specific statuses and notifications:

1 ***Quote Status and Management***
Upon creation, the quote status appears as "Quote Pending" in the Quotes section.

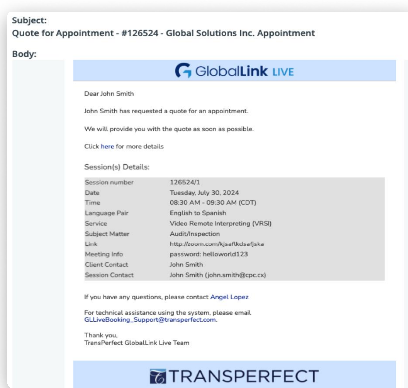
Simultaneously, the associated appointment remains in "Awaiting Quote" status until the quote receives client approval.





2 ***Ensuring Quote Approval***
This workflow ensures that no interpreter search activities commence until the client approves the quote.

Users are notified via email when a new quote is generated, providing immediate awareness of quote creation and status.



Subject:
Quote for Appointment - #126524 - Global Solutions Inc. Appointment

Body:

GlobalLink LIVE

Dear John Smith

John Smith has requested a quote for an appointment.

We will provide you with the quote as soon as possible.

Click here for more details

Session(s) Details:

Session number	126524/1
Date	Tuesday, July 30, 2024
Time	08:30 AM - 09:30 AM (CDT)
Language Pair	English to Spanish
Service	Video Remote Interpreting (VRSI)
Subject Matter	Audit/Inspection
Link	http://zoom.com/kjsaflkdsafjska
Meeting Info	password: helloworld123
Client Contact	John Smith
Session Contact	John Smith (john.smith@cpc.cx)

If you have any questions, please contact Angel Lopez

For technical assistance using the system, please email GLLiveBooking_Support@transperfect.com.

Thank you,
TransPerfect GlobalLink Live Team

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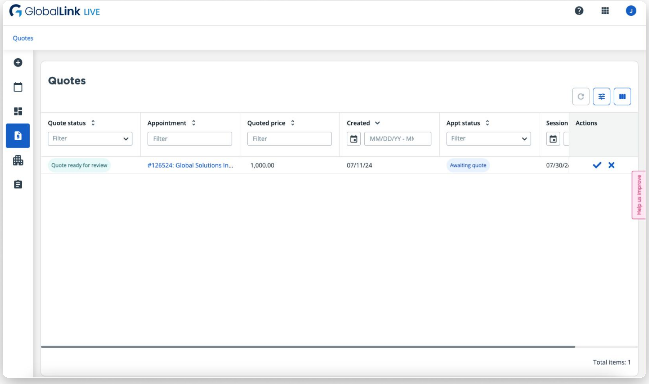
3 ***Maintaining Workflow Integrity***
By linking appointment status to quote approval, the platform maintains integrity in interpreter assignment processes, aligning actions with client decisions.

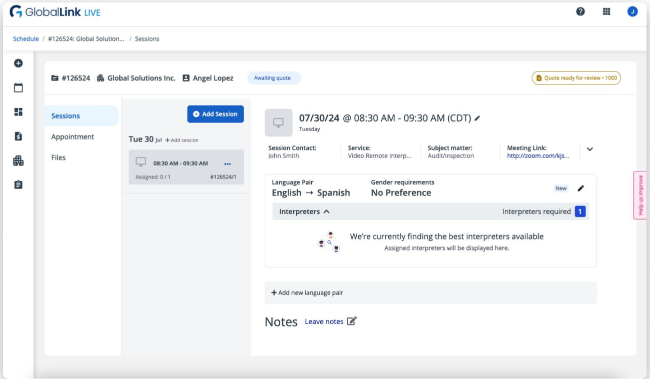
Reviewing and Approving Quotes

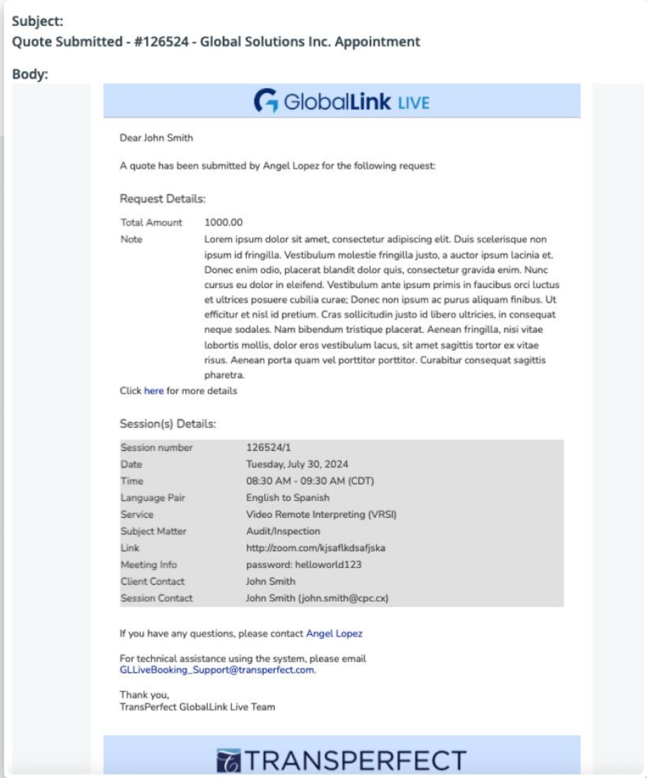
Once TransPerfect sends a quote for user approval, users can monitor and take action accordingly:



1. *Monitoring Quote Status*
   Users can track the status change of quotes within the platform. They have the ability to filter and view quotes based on their status.

When a quote is ready for client review, its status will indicate "Quote Ready for Review." Meanwhile, the associated appointment remains in "Awaiting Quote" status, ensuring no further action is taken until the quote is approved.





Subject:
Quote Submitted - #126524 - Global Solutions Inc. Appointment

Body:

GlobalLink LIVE

Dear John Smith

A quote has been submitted by Angel Lopez for the following request:

Request Details:

Total Amount	1000.00
Note	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis scelerisque non ipsum id fringilla. Vestibulum molestie fringilla justo, a auctor ipsum lacinia et. Donec enim odio, placerat blandit dolor quis, consectetur gravida enim. Nunc cursus eu dolor in eleifend. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia curae; Donec non ipsum ac purus aliquam finibus. Ut efficitur et nisl id pretium. Cras sollicitudin justo id libero ultricies, in consequat neque sodales. Nam bibendum tristique placerat. Aenean fringilla, nisi vitae lobortis mollis, dolor eros vestibulum lacus, sit amet sagittis tortor ex vitae risus. Aenean porta quam vel porttitor porttitor. Curabitur consequat sagittis pharetra.

Click here for more details

Session(s) Details:

Session number	126524/1
Date	Tuesday, July 30, 2024
Time	08:30 AM - 09:30 AM (CDT)
Language Pair	English to Spanish
Service	Video Remote Interpreting (VRSI)
Subject Matter	Audit/Inspection
Link	http://zoom.com/kjsaflkdsafjska
Meeting Info	password: helloworld123
Client Contact	John Smith
Session Contact	John Smith (john.smith@cpc.cx)

If you have any questions, please contact Angel Lopez

For technical assistance using the system, please email GLLiveBooking_Support@transperfect.com.

Thank you,
TransPerfect GlobalLink Live Team

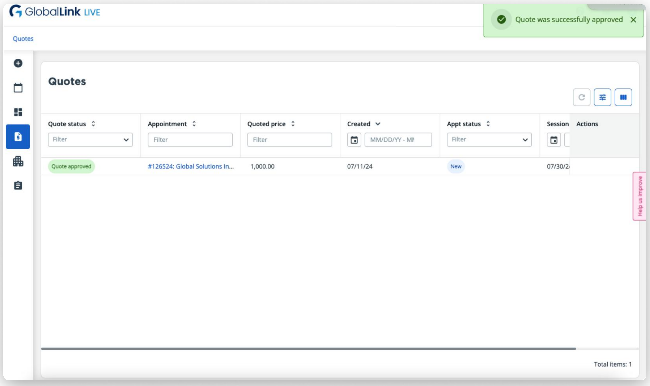
TRANSPERFECT

2. *Email Notification*
   Users receive an email notification from TransPerfect when a quote is sent for review. This email prompts users to process, accept, or decline the quote directly through the platform.

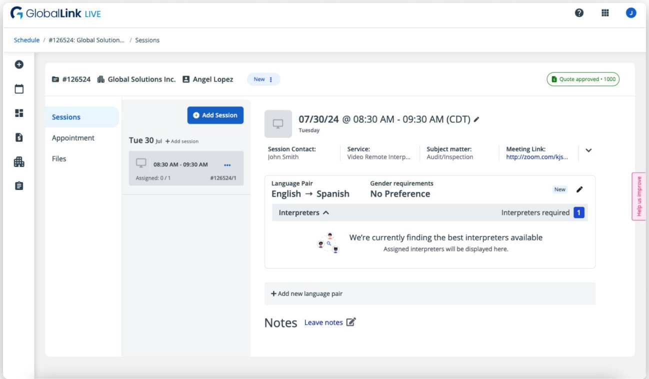
Approving a Quote

To approve a quote, follow these steps:

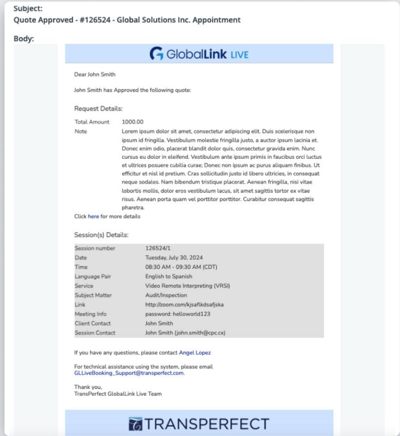
- Access the Quotes section within the platform where all quotes are listed.
- Find the quote that requires approval. Quotes in "Quote Ready for Review" status are ready for your action.
- In the Actions column associated with the quote, there will be buttons for "Accept" and "Decline."
- Click on the "Accept" button. This action changes the status of the quote from "Quote Ready for Review" to "Quote Approved."



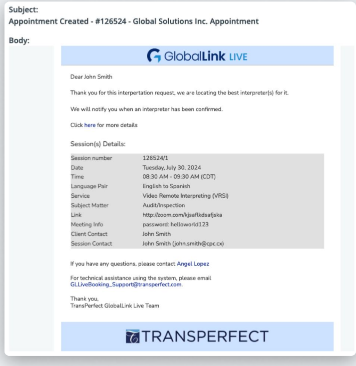
1 ***Effect on Appointment***
Upon approving the quote, the appointment linked to it will transition to a state where TransPerfect can start searching for interpreters.



2 ***Email Notifications***
The user receives two email notifications:



One confirming that the quote has been approved.

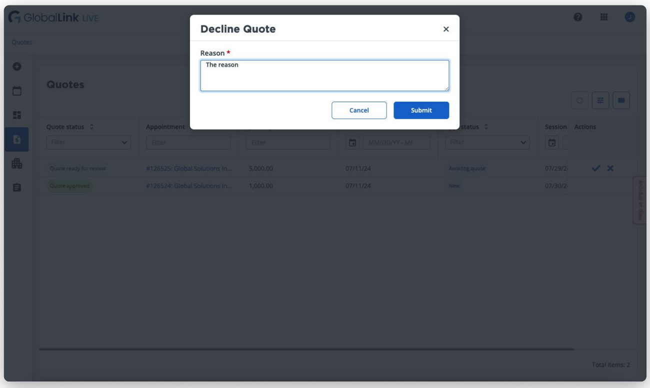


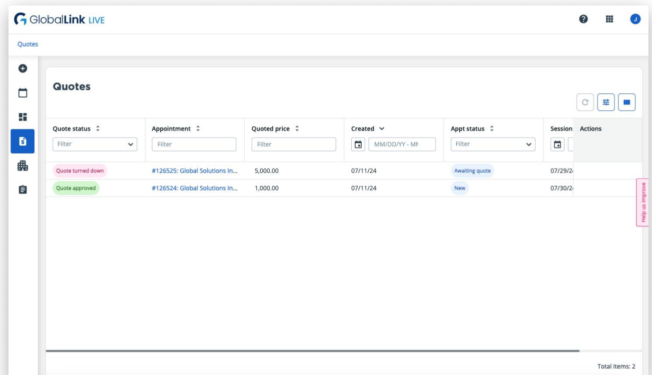
Another notifying that the appointment has been confirmed and interpreters can now be assigned.

Declining a Quote

To decline a quote, follow these steps:

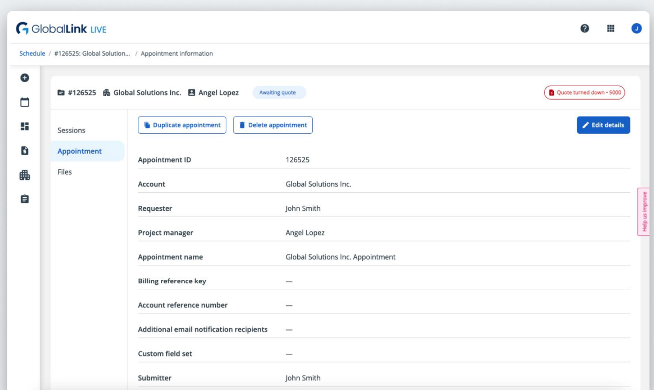
- Access the Quotes section within the platform where all quotes are listed.
- Find the quote that requires approval. Quotes in "Quote Ready for Review" status are ready for your action.
- In the Actions column associated with the quote, there will be buttons for "Accept" and "Decline."
- Click on the "Decline" button. The system will ask for the reason for canceling



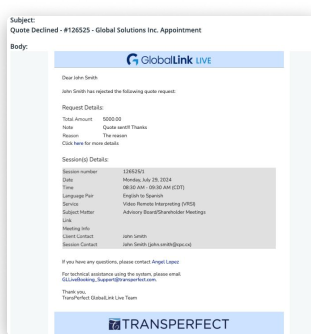


This action changes the status of the quote from "Quote Ready for Review" to "Quote turned down"

1 *Effect on Appointment*
Upon declining the quote, the appointment linked to it will be in the same status until is canceled or resubmit the quote and accepted



2 *Email Notifications*
The user receives one email informing about the quote being declined



Troubleshooting Common Issues

Contact for technical support

Please contact GLLiveBooking Support at GLLiveBooking_Support@transperfect.com
or use the help desk feature “?” > “Contact support“